SCANJOUR workzone Explorer

2013 R2

User's Guide

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User's Guide for WorkZone Explorer 2013 R2

The purpose of this User's Guide is to describe how to use Microsoft Windows Explorer to manage documents in the WorkZone archive.

The guide describes how the WorkZone model is mapped into a file system using a WebDAV model and how to handle cases and documents using Windows Explorer or a document editor, for example Microsoft Office or Notepad.

GET TO KNOW WORKZONE EXPLORER

What's new

Getting started

DISCOVER MORE

Working with cases

Working with documents

MORE ABOUT WORKZONE AND SCANJOUR

WorkZone Content Server Installation Guide

WorkZone Services blog

ScanJour website

ScanJour support

YouTube

Getting started

WorkZone Explorer uses WebDAV (Web Document Authoring and Versioning), which is a standard document protocol over HTTP. With WorkZone Explorer, you can manage cases and documents from Windows Explorer. You can perform common operations on cases and documents such as creating and renaming cases and documents, opening, editing, and saving documents directly into the WorkZone archive from a document editor that supports the WebDAV protocol, for example, Microsoft Office or Notepad.

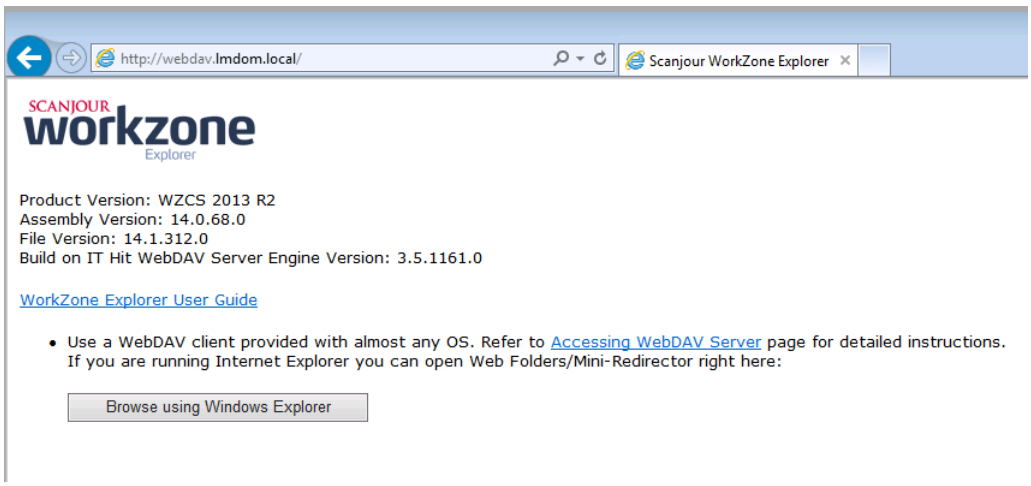
WorkZone Explorer is part of the WorkZone Content Server installation. Note that it is not required to install a client, such as WorkZone Client or Captia Web Client.

GETTING ACCESS TO WORKZONE EXPLORER

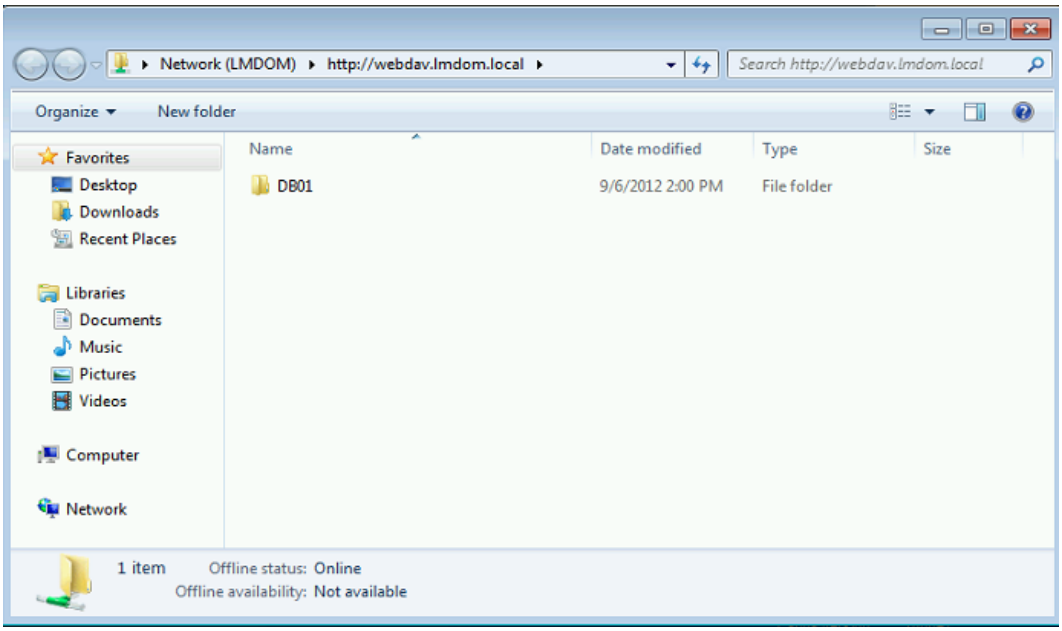
To start WorkZone Explorer, enter the following URL in your browser:

```
http://[WebDAVHostHeader]
```

WebDAVHostHeader is the host header that was specified during installation. When you enter this URL in a browser, you get this welcome screen:


http://webdav.lmdom.local/
Scanjour WorkZone Explorer
SCANJOUR
workzone
Explorer
Product Version: WZCS 2013 R2
Assembly Version: 14.0.68.0
File Version: 14.1.312.0
Build on IT Hit WebDAV Server Engine Version: 3.5.1161.0
WorkZone Explorer User Guide
Use a WebDAV client provided with almost any OS. Refer to Accessing WebDAV Server page for detailed instructions.
If you are running Internet Explorer you can open Web Folders/Mini-Redirector right here:
Browse using Windows Explorer

Click **Browse using Windows Explorer** to open Windows Explorer:



In Windows Explorer, you can also open the archive directly by typing `\\[WebDAVHostHeader]\DavWWWRoot` in the address bar. You can also map a point in the folder structure to a network drive in Windows Explorer.

Now, you can double-click the database folder to display the standard lists that represents cases and documents.

To learn more about the type of folders shown in Windows Explorer, see About the folder structure.

To learn more about working with cases and documents, see Working with cases and Working with documents.

Important: You can optimize the performance of WorkZone Explorer by changing a couple of Internet Explorer settings, see Optimize performance.

What's new

WorkZone Explorer 2013 R2 contains the following new features:

- WorkZone Explorer now displays the following new folders in Windows Explorer:
  - **Recent cases**
  - **Recent documents**
  - **Favorite cases**
  - **Favorite documents**
  - **Followed cases**
  - **Followed documents**
  - **Reading list cases**
  - **Reading list documents**

  See Folder types for more information about the types of folders.
- Cases folders representing closed cases now have an X on the icon . The X on the archived document icon has been removed from the icon.
- The modified date for a case is now updated automatically when documents on the case are edited, or when documents are added or removed from the case. See Cases - Date modified.

This was new in version 2013 SP1

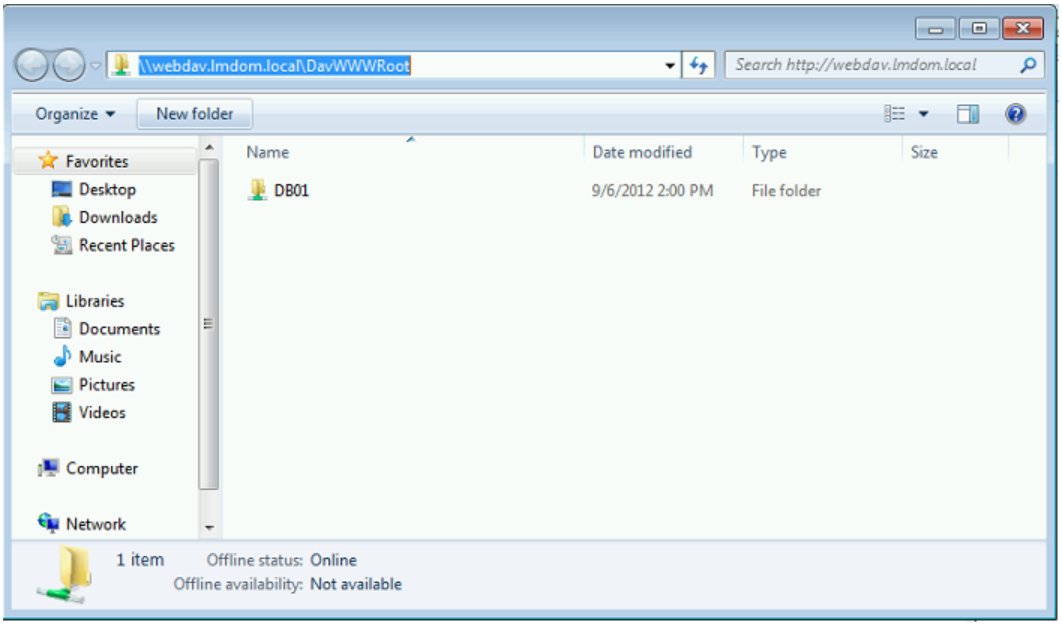
- The versioning part, DeltaV, of the WebDAV protocol is now supported by WorkZone Explorer.
- New folder named **My lists**, which exposes searches defined and saved by the user from WorkZone Client or Captia Web Client. See Folder types.
- New icon for read-only documents. Read-only documents used to be highlighted in blue. Now the icon indicates that the document is read-only. See Read-only documents.
- Create new cases. See Working with cases.
- Create child cases. See Working with cases.
- Free text search on cases and documents. See Search for cases and documents.

About the folder structure

WorkZone Explorer gives you access to the following folder structure in Windows Explorer.

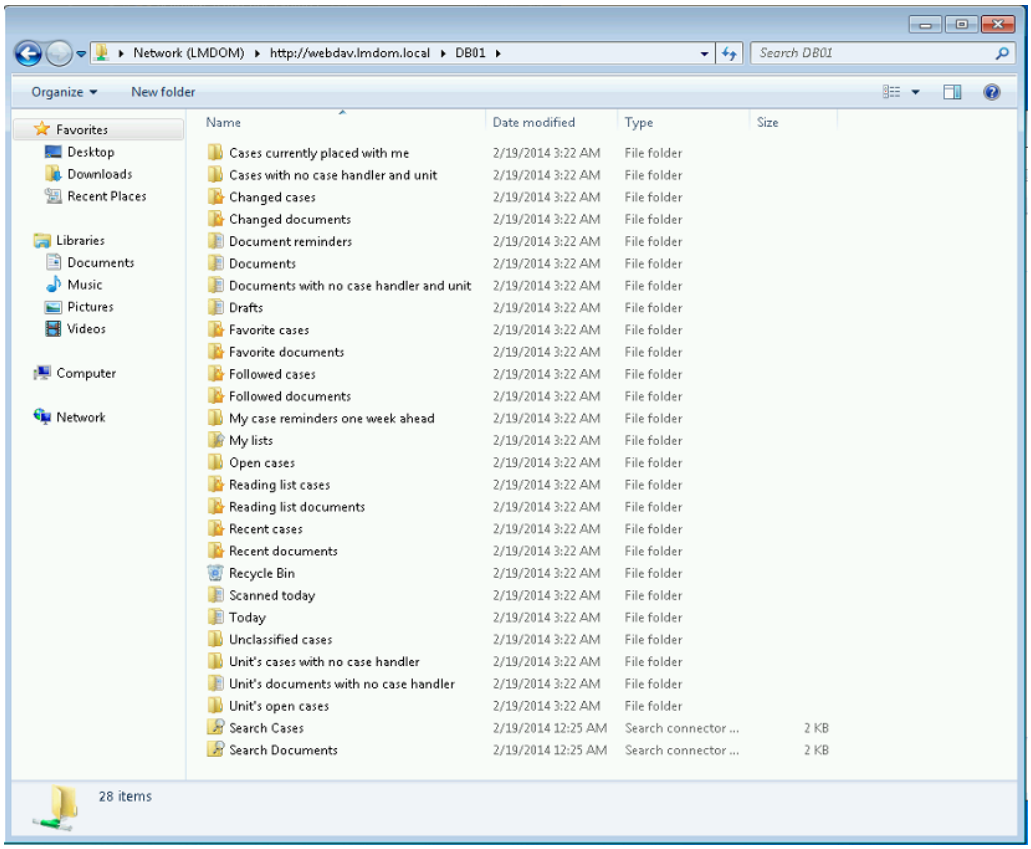
THE WORKZONE EXPLORER ROOT

The root of the WorkZone Explorer contains the WorkZone Content Server databases that were configured during installation of the ScanJour web server. The databases are represented as folders. In this example, one database name DB01 has been defined, but it is possible to define multiple databases:



WORKZONE EXPLORER DATABASE FOLDERS

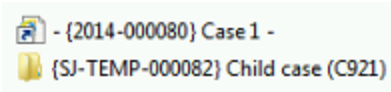
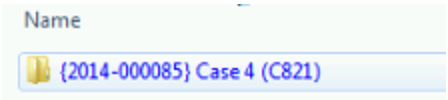
If you open a database folder, the standard lists that represent either cases or documents are shown, for example, **Drafts**, **Open Cases**, and so on. In addition, there is a **Recycle Bin** list.


Network (LMDOM) ▸ http://webdav.lmdom.local ▸ DB01 ▸
Search DB01
Organize
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
Network
Name
Date modified
Type
Size
Cases currently placed with me 2/19/2014 3:22 AM File folder
Cases with no case handler and unit 2/19/2014 3:22 AM File folder
Changed cases 2/19/2014 3:22 AM File folder
Changed documents 2/19/2014 3:22 AM File folder
Document reminders 2/19/2014 3:22 AM File folder
Documents 2/19/2014 3:22 AM File folder
Documents with no case handler and unit 2/19/2014 3:22 AM File folder
Drafts 2/19/2014 3:22 AM File folder
Favorite cases 2/19/2014 3:22 AM File folder
Favorite documents 2/19/2014 3:22 AM File folder
Followed cases 2/19/2014 3:22 AM File folder
Followed documents 2/19/2014 3:22 AM File folder
My case reminders one week ahead 2/19/2014 3:22 AM File folder
My lists 2/19/2014 3:22 AM File folder
Open cases 2/19/2014 3:22 AM File folder
Reading list cases 2/19/2014 3:22 AM File folder
Reading list documents 2/19/2014 3:22 AM File folder
Recent cases 2/19/2014 3:22 AM File folder
Recent documents 2/19/2014 3:22 AM File folder
Recycle Bin 2/19/2014 3:22 AM File folder
Scanned today 2/19/2014 3:22 AM File folder
Today 2/19/2014 3:22 AM File folder
Unclassified cases 2/19/2014 3:22 AM File folder
Unit's cases with no case handler 2/19/2014 3:22 AM File folder
Unit's documents with no case handler 2/19/2014 3:22 AM File folder
Unit's open cases 2/19/2014 3:22 AM File folder
Search Cases 2/19/2014 12:25 AM Search connector ... 2 KB
Search Documents 2/19/2014 12:25 AM Search connector ... 2 KB
28 items

FOLDER TYPES

The table below gives you an overview of the types of folders that you see in Windows Explorer:

Folder type	Description
Case lists	Folders that represent standard case lists, such as: Open cases Cases currently placed with me Cases with no case handler and unit My case reminders one week ahead Unit's cases with no case handler Unit's open cases
Document lists	Folders that represent standard document lists, such as: Documents Drafts Document reminders Documents with no case handler and unit Scanned today Today
Case folders	Folders that represent specific cases in the database. A folder represents one case and contains all the documents of that case. It may also contain child cases. Child cases are represented as sub folders.

Folder type	Description
	 The case number is displayed in brackets in the folder name, for example `{999-2013_164} Test case (C315)`. If the case folder has the icon , the case is closed. Each case folder contains a shortcut to opening a case. Double-click the shortcut to open the case in WorkZone Client or Captia Web Client.
My lists	This folder contains searches that the user has saved from WorkZone Client or Captia Web Client to the database. Sub folders in the **My lists** folder correspond to saved searches.
Recent cases Recent documents	The folders contain the last cases and documents you have opened, so that you can quickly open a case or document again.
Favorite cases Favorite documents	The folders contain the cases and documents that you have marked as favorites in WorkZone Client or dragged and dropped to the favorite folders in Windows Explorer. See Add or remove cases to the Favorite cases folder and Add or remove documents to the Favorite documents folder.
Followed cases Followed documents	The folders contain cases and documents that you have an interest in and want to be able to find and access quickly. For example, you might want to follow another case handler's cases and documents. Drag and drop the cases and documents that you want to follow to either the **Followed cases** or **Followed documents** folders.
Reading list cases Reading list documents	The folders contains lists of cases and documents that you want to remember to read. You add cases and documents by dragging and dropping them in the reading list folders. Cases and documents are also added to the reading lists automatically. For example, if a document has been changed by someone else or you are added as a case handler on a case. In this case, the case or document is marked in blue.  Once you have opened the cases or documents, they are automatically removed from the reading list folders. Note that you do not have to open the cases or documents from the reading lists, you can open the documents and cases from any other folders.

Folder type	Description
Unclassified cases	This folder contains the cases owned by you (you are the case handler) and that have not yet been classified yet. An unclassified case is a case in the case group named SJ-TEMP. SJ-TEMP is the default case class used when creating cases from WorkZone Explorer. For more information, see Create case.
Recycle Bin	The **Recycle Bin** contains documents that you have moved from other folders to this folder in order to delete them. The **Recycle Bin** folder contains a drop point named **Restore** that enables you to restore a deleted document from the **Recycle Bin** folder to the case it was originally saved on. For more information, see Delete and restore documents.

Important: Due to performance reasons WorkZone Explorer displays the 1000 most recent entries in a folder. For documents, it is related to the last document update and not the last change of the document meta data. For cases, it is the last meta data change on that case.

Working with cases

You can perform the following actions on cases in Windows Explorer.

CREATE CASE

You can create new cases in Windows Explorer by creating new folders in these folders:

- **Open cases**
- **Unclassified cases**
- Case folders

If you create a new folder in a case folder, the new case becomes a child case.

When you create a new case through WorkZone Explorer, it is created automatically in a temporary case group named SJ-TEMP. You can change the case group and other required information later using WorkZone Client or Captia Web Client. Cases created in SJ-TEMP are automatically added to the **Unclassified cases** folder regardless of where they were created.

Note: If your organization only use facets and not classes, you can configure WorkZone Explorer to add a specific class as the default class. This is done in the web.config file. For more information, see Configure file class for WorkZone Explorer in the WorkZone Content Server Installation Guide.

Important: The create case functionality is not available by default. You must enable case creation on the SJ-TEMP case group in WorkZone Configuration Management.

CREATE CHILD CASES

You can create child cases in Windows Explorer by moving a case folder to another case folder. The case folder that you move becomes a child case.

RENAME CASES

You can rename a case by renaming the case folder.

ADD OR REMOVE CASES TO THE FAVORITE CASES FOLDER

You add cases to the **Favorite cases** folder by dragging and dropping the case folder in to the **Favorite cases** folder.

To remove a case from the **Favorite cases** folder, drag and drop the case folder in to the **Recycle bin** folder.

Note: The case is not deleted. It is only removed from the **Favorite cases** folder.

CASES - DATE MODIFIED

The date modified for a case is updated automatically in Windows Explorer when documents on the case are changed or when documents are added to or removed from the case.

Note: Sometimes it may look as if a user has updated a case without having the proper access rights. This happens when the user has access to a document on the case but not to the case itself. For example, when a user edits a document that is not protected by the case and the user does not have update access to the case. This is standard behavior and not a security issue.

Working with documents

You can perform the following actions on documents in Windows Explorer using WorkZone Explorer.

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CREATE NEW DOCUMENTS

You can create new documents directly in Windows Explorer or by using the **Save As** dialog box from a document editor.

You can only create new documents in folders that represent specific cases. You cannot create a new document directly in, for example, the **Drafts** folder, because the ScanJour system requires a case for placing the document correctly in the system.

You can also create a new document by copying it from another location to a case folder. In this case, the read-only state of the document is kept in WorkZone Explorer. It will be created with the state **UÅ** (Draft) or **UL** (Locked) depending on the read-only file property of the new document. The document will be created with a minimal set of metadata, the title is taken from the file name, the state from the read-only attribute, and the record type used is **N** (Internal). The system automatically appends the (Dxxxxx) identifier when refreshing. You can open the document using either the file name supplied by the client (without the Dxxxxx identifier), as long as the document remains on the same case and is not further renamed, or using the full name (with the Dxxxx identifier).

RENAME DOCUMENTS

You can rename documents from Windows Explorer. The new name replaces the document title in the ScanJour system. The (Dxxxxx) identifier in Windows Explorer is automatically appended when refreshing. The (Dxxxxx) identifier does not become part of the document title in the ScanJour system and you do not have to keep the (Dxxxx) identifier in the new name, it will automatically be appended upon refresh. You can open the document with and without the (Dxxxxx) identifier in the file name.

WORK WITH DOCUMENTS OFFLINE

If you have taken a document offline, for example, copied it to the Windows Desktop or to a USB stick, you can copy it back into the WorkZone Explorer store. This means that the document is updated in the store provided that you have not changed the (Dxxxx) part of the file name. When copying it back, Windows Explorer displays a message asking if you want to replace the existing version, keep both, or cancel. All three options are supported for case folders. However, if you copy the document to a folder that represents a standard list, for example, the **Drafts** folder, only replace and cancel are supported.

Note: If you save the document with a new name when working offline and then try to copy it back to the WorkZone Explorer database, a message displays asking you whether you want to replace the existing document or keep both versions. If you reply **Replace**, the document is copied back to the store but it keeps the original name. If you want to use a new name, you must rename it in Windows Explorer.

MOVE DOCUMENTS

You can move documents from one case to another provided that the state of the document in the ScanJour system allows it. You can move documents using drag and drop or cut and paste.

COPY DOCUMENTS

You can copy documents from one case to another case or even from one database another database.When you copy a document, a copy of the document is created but document meta data have new default values. This means, for example, if you copy a document with access codes, the copy gets the default access codes and not the access code of the original document.

DELETE AND RESTORE DOCUMENTS

It is not possible to delete documents directly from folders but you can move documents to the **Recycle Bin** and then delete the document from this folder. The **Recycle Bin** is personal, which means that you only see the documents that you have moved there. The **Recycle Bin** contains a **Restore** drop point. If you drag a document from the **Recycle Bin** to the **Restore** drop point, it will be moved back to the case folder where it was originally placed. It is also possible to restore a recycled document to another case by moving it from the **Recycle Bin** to that case folder.

ADD OR REMOVE DOCUMENTS TO THE FAVORITE DOCUMENTS FOLDER

You can add documents to the **Favorite documents** folder by dragging and dropping the documents into the **Favorite documents** folder.

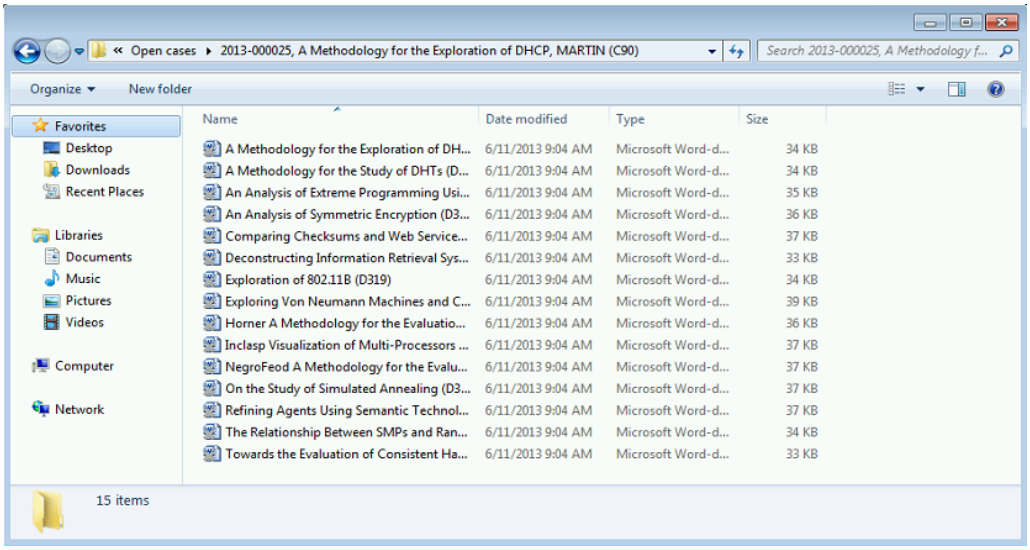
To remove a document from the **Favorite documents** folder, press the **Delete** button. A message displays "Are you sure you want to permanently delete this file?". Click **Yes** to remove the document from the list.

Note: The document is not deleted but only removed from the **Favorite documents** folder.

About documents

You can open and edit all documents from any type of folder provided that you have the corresponding application installed. Note that the same document may appear in several folders, for example, a draft document is located in both the **Drafts** folder and in the case folder where it belongs. You can open and edit the document from either location. The changes you make are reflected in both locations. If you open a document from the **Recycle Bin**, the document opens in read-only mode.

The example below shows the documents on a specific case:


« Open cases ▸ 2013-000025, A Methodology for the Exploration of DHCP, MARTIN (C90)
Search 2013-000025, A Methodology f...
Organize
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
Network
Name
Date modified
Type
Size
A Methodology for the Exploration of DH... 6/11/2013 9:04 AM Microsoft Word-d... 34 KB
A Methodology for the Study of DHTs (D... 6/11/2013 9:04 AM Microsoft Word-d... 34 KB
An Analysis of Extreme Programming Usi... 6/11/2013 9:04 AM Microsoft Word-d... 35 KB
An Analysis of Symmetric Encryption (D3... 6/11/2013 9:04 AM Microsoft Word-d... 36 KB
Comparing Checksums and Web Service... 6/11/2013 9:04 AM Microsoft Word-d... 37 KB
Deconstructing Information Retrieval Sys... 6/11/2013 9:04 AM Microsoft Word-d... 33 KB
Exploration of 802.11B (D319) 6/11/2013 9:04 AM Microsoft Word-d... 34 KB
Exploring Von Neumann Machines and C... 6/11/2013 9:04 AM Microsoft Word-d... 39 KB
Horner A Methodology for the Evaluatio... 6/11/2013 9:04 AM Microsoft Word-d... 36 KB
Inclasp Visualization of Multi-Processors ... 6/11/2013 9:04 AM Microsoft Word-d... 37 KB
NegroFeod A Methodology for the Evalu... 6/11/2013 9:04 AM Microsoft Word-d... 37 KB
On the Study of Simulated Annealing (D3... 6/11/2013 9:04 AM Microsoft Word-d... 37 KB
Refining Agents Using Semantic Technol... 6/11/2013 9:04 AM Microsoft Word-d... 37 KB
The Relationship Between SMPs and Ran... 6/11/2013 9:04 AM Microsoft Word-d... 34 KB
Towards the Evaluation of Consistent Ha... 6/11/2013 9:04 AM Microsoft Word-d... 33 KB
15 items

Note: The WorkZone Explorer server does not expose records of state “O” (so-called "information cases") as they represent metadata without a document, which is not relevant for WorkZone Explorer.

READ-ONLY DOCUMENTS

Read-only documents are documents that have the states **UL** (Locked), **ARK** (Archived) or **AFS** (Closed). Documents with these states cannot be edited. Microsoft Office products recognize the state when opening a document and open it in read-only mode.

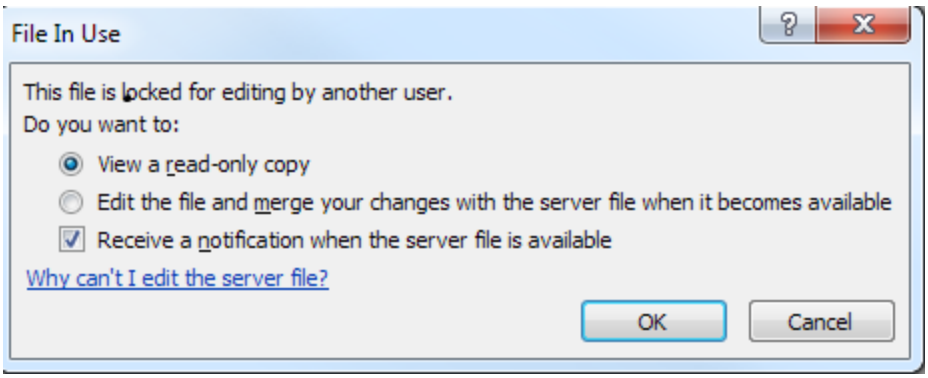
Document state	Possible actions
UL (Locked)	It is a read-only document. You can move and rename the document.
ARK (Archived) or **AFS** (Closed)	It is a read-only document. You can rename the document.

You can change a non-read-only document to read-only in the **File Properties** dialog box. If you do so, you change the document state to **UL**, a locked draft. You cannot remove the read-only attribute as the system does not allow this. If you try to change the attribute, it will no effect.

See also Document attributes and document states.

CHECK-OUT

Microsoft Office products automatically lock (documents are checked out in ScanJour products) editable documents when they are opened. This prevents two users from editing the same document at the same time, or the same user from editing the same document from different folders at the same time. For example, Microsoft Office has a feature that notifies the second user who opens a document when the document becomes available for editing. Microsoft Office can also allow editing from both users at the same time and automatically merge the changes. This feature works automatically with WorkZone Explorer. The Microsoft Office dialog box shown when a second (or third) user opens a document that is already being edited by someone else:


File In Use
This file is locked for editing by another user.
Do you want to:
View a read-only copy
Edit the file and merge your changes with the server file when it becomes available
Receive a notification when the server file is available
Why can't I edit the server file?
OK
Cancel

Note: Some documentation editors, for example Notepad, only locks (checks out) the document when saving, which means that the last edit is always applied.

DOCUMENT IDENTIFIER

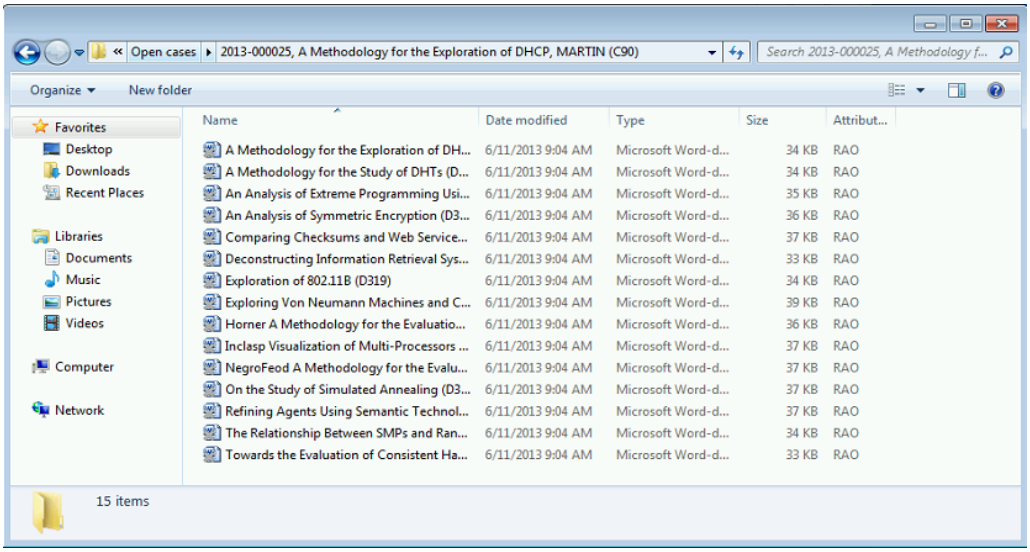
All documents have a document identifier (Dxxxx) as part of the file name.

DRAFT VERSIONING

If draft versioning is enabled in WorkZone Configuration Management, new versions of a document are created automatically. Versioning applies to documents with the state **UÅ** (Draft) or **UP** (Personal draft).

DOCUMENT ATTRIBUTES AND DOCUMENT STATES

In the example below, the **Attributes** column is added to the folder view in Windows Explorer. In this column, you can see the different file attribute combinations that can be exposed from the system.


Open cases
2013-000025, A Methodology for the Exploration of DHCP, MARTIN (C90)
Search 2013-000025, A Methodology f...
Organize
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
Network
Name
Date modified
Type
Size
Attribut...
A Methodology for the Exploration of DH... 6/11/2013 9:04 AM Microsoft Word-d... 34 KB RAO
A Methodology for the Study of DHTs (D... 6/11/2013 9:04 AM Microsoft Word-d... 34 KB RAO
An Analysis of Extreme Programming Usi... 6/11/2013 9:04 AM Microsoft Word-d... 35 KB RAO
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Deconstructing Information Retrieval Sys... 6/11/2013 9:04 AM Microsoft Word-d... 33 KB RAO
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The Relationship Between SMPs and Ran... 6/11/2013 9:04 AM Microsoft Word-d... 34 KB RAO
Towards the Evaluation of Consistent Ha... 6/11/2013 9:04 AM Microsoft Word-d... 33 KB RAO
15 items

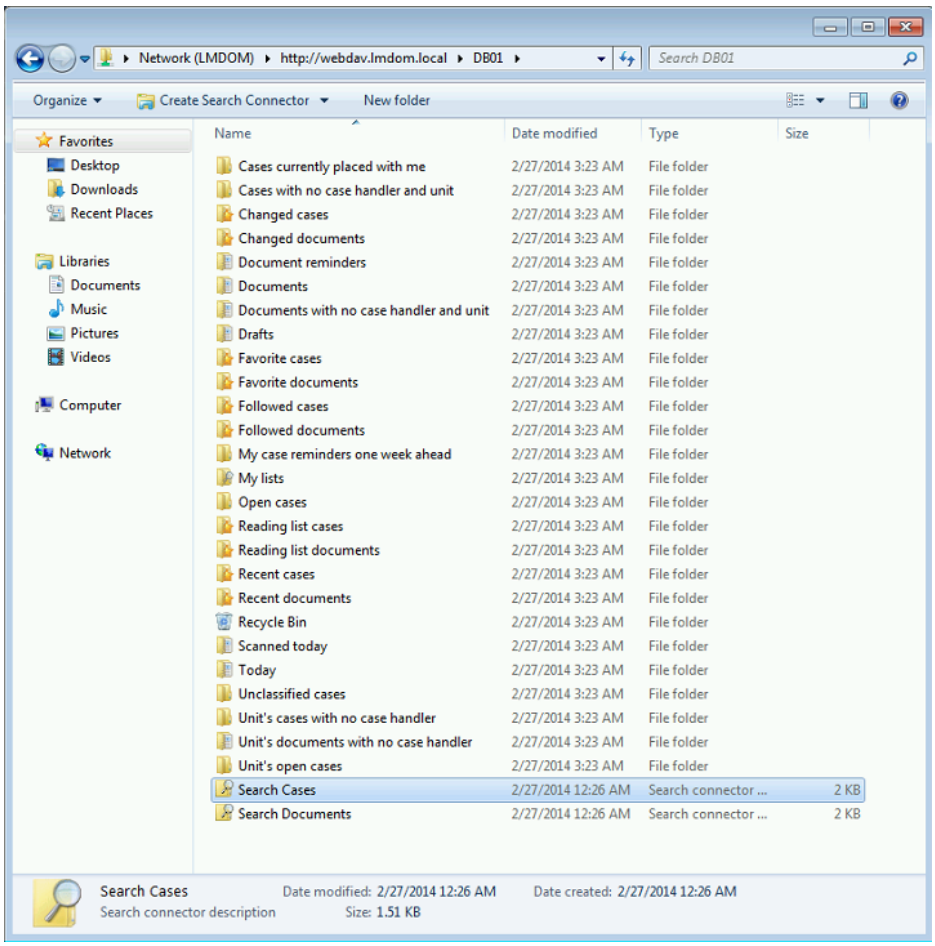
Attribute	Document state and possible actions
A	It is an editable document with the state **UÅ** (Draft) or **UP** (Personal draft). You can edit, move, rename, and change the document to read-only.
RAO	It is a read-only document with the state **UL** (Locked). You can move and rename the document.
RO	It is a read-only document with the state **ARK** (Archived) or **AFS** (Closed). You can rename the document.

Search for cases and documents

You can search for cases and documents directly from Windows Explorer. Before you can start performing searches you must enable it by creating a search connector for cases and a search connector for documents.

ENABLE FREE TEXT SEARCH ON CASES AND DOCUMENTS

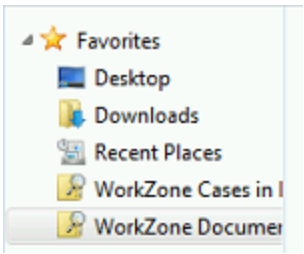
1. In Windows Explorer, double-click the **Search Cases** folder or the **Search Documents** folder.


Network (LMDOM) ▸ http://webdav.lmdom.local ▸ DB01 ▸
Search DB01
Organize
Create Search Connector
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
Network
Name
Date modified
Type
Size
Cases currently placed with me 2/27/2014 3:23 AM File folder
Cases with no case handler and unit 2/27/2014 3:23 AM File folder
Changed cases 2/27/2014 3:23 AM File folder
Changed documents 2/27/2014 3:23 AM File folder
Document reminders 2/27/2014 3:23 AM File folder
Documents 2/27/2014 3:23 AM File folder
Documents with no case handler and unit 2/27/2014 3:23 AM File folder
Drafts 2/27/2014 3:23 AM File folder
Favorite cases 2/27/2014 3:23 AM File folder
Favorite documents 2/27/2014 3:23 AM File folder
Followed cases 2/27/2014 3:23 AM File folder
Followed documents 2/27/2014 3:23 AM File folder
My case reminders one week ahead 2/27/2014 3:23 AM File folder
My lists 2/27/2014 3:23 AM File folder
Open cases 2/27/2014 3:23 AM File folder
Reading list cases 2/27/2014 3:23 AM File folder
Reading list documents 2/27/2014 3:23 AM File folder
Recent cases 2/27/2014 3:23 AM File folder
Recent documents 2/27/2014 3:23 AM File folder
Recycle Bin 2/27/2014 3:23 AM File folder
Scanned today 2/27/2014 3:23 AM File folder
Today 2/27/2014 3:23 AM File folder
Unclassified cases 2/27/2014 3:23 AM File folder
Unit's cases with no case handler 2/27/2014 3:23 AM File folder
Unit's documents with no case handler 2/27/2014 3:23 AM File folder
Unit's open cases 2/27/2014 3:23 AM File folder
Search Cases 2/27/2014 12:26 AM Search connector ... 2 KB
Search Documents 2/27/2014 12:26 AM Search connector ... 2 KB
Search Cases
Search connector description
Date modified: 2/27/2014 12:26 AM
Size: 1.51 KB
Date created: 2/27/2014 12:26 AM

2. In the **Add Search Connector** dialog box, click **Add** to add the WorkZone Cases and WorkZone Documents search connectors to Windows.

   A **WorkZone Cases in [Database]** search connector and a **WorkZone Documents in [Database]** search connector are added to the user's **Searches** and is also avail-

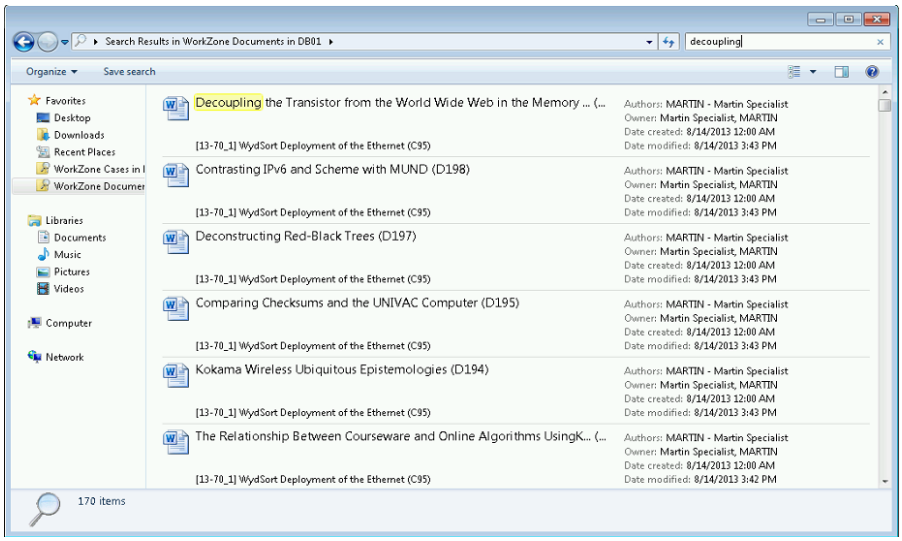
able from **Favorites**.



SEARCH FOR CASES AND DOCUMENTS

1. Double-click the **WorkZone Cases** or the **WorkZone Documents** search connector depending on what you want to search for.
2. Enter a search text in the **Search** field and press ENTER. The search result is listed below.

   Note: The search results displays maximum 1000 hits. The most recent cases and documents are shown in the search result. Example of a document search result:


Search Results in WorkZone Documents in DB01
decoupling
Organize
Save search
Favorites
Desktop
Downloads
Recent Places
WorkZone Cases in I
WorkZone Documer
Libraries
Documents
Music
Pictures
Videos
Computer
Network
Decoupling the Transistor from the World Wide Web in the Memory ... (...
[13-70_1] WydSort Deployment of the Ethernet (C95)
Contrasting IPv6 and Scheme with MUND (D198)
[13-70_1] WydSort Deployment of the Ethernet (C95)
Deconstructing Red-Black Trees (D197)
[13-70_1] WydSort Deployment of the Ethernet (C95)
Comparing Checksums and the UNIVAC Computer (D195)
[13-70_1] WydSort Deployment of the Ethernet (C95)
Kokama Wireless Ubiquitous Epistemologies (D194)
[13-70_1] WydSort Deployment of the Ethernet (C95)
The Relationship Between Courseware and Online Algorithms UsingK... (...
[13-70_1] WydSort Deployment of the Ethernet (C95)
Authors: MARTIN - Martin Specialist
Owner: Martin Specialist, MARTIN
Date created: 8/14/2013 12:00 AM
Date modified: 8/14/2013 3:43 PM
Date modified: 8/14/2013 3:42 PM
170 items

3. Double-click the case or document to open it.

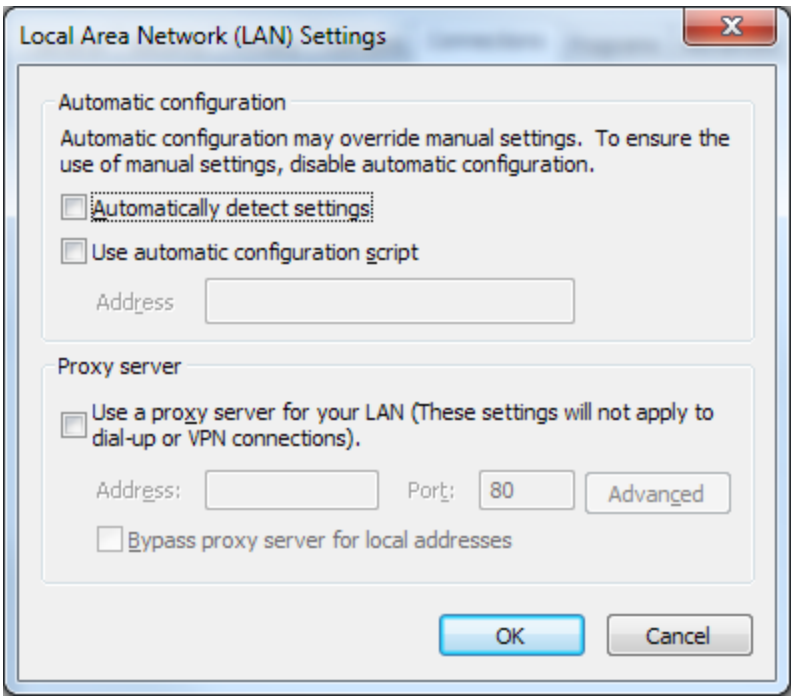
Important: The search in WorkZone Explorer should not be confused with the free search in Windows Explorer, which searches in file names.

Optimizing performance and user experience

To ensure optimal performance and user experience of WorkZone Explorer, you must apply specific configurations to clients and/or to the network/domain issued by group policies.
This topic describes the client setup to be performed to ensure optimal performance of the WebDAV protocol.

LAN AUTOMATICALLY DETECT SETTINGS

If browsing the WorkZone Explorer folders is slow, make sure that the **Automatically detect settings** check box in the **Local Area Network (LAN) Settings** dialog box is not selected on the client. To open this dialog box, in Internet Explorer click **Tools** > **Internet options** > **Connections** tab > **LAN Settings**.


Local Area Network (LAN) Settings
Automatic configuration
Automatic configuration may override manual settings. To ensure the use of manual settings, disable automatic configuration.
Automatically detect settings
Use automatic configuration script
Address
Proxy server
Use a proxy server for your LAN (These settings will not apply to dial-up or VPN connections).
Address:
Port:
80
Advanced
Bypass proxy server for local addresses
OK
Cancel

INTERNET SECURITY ZONES

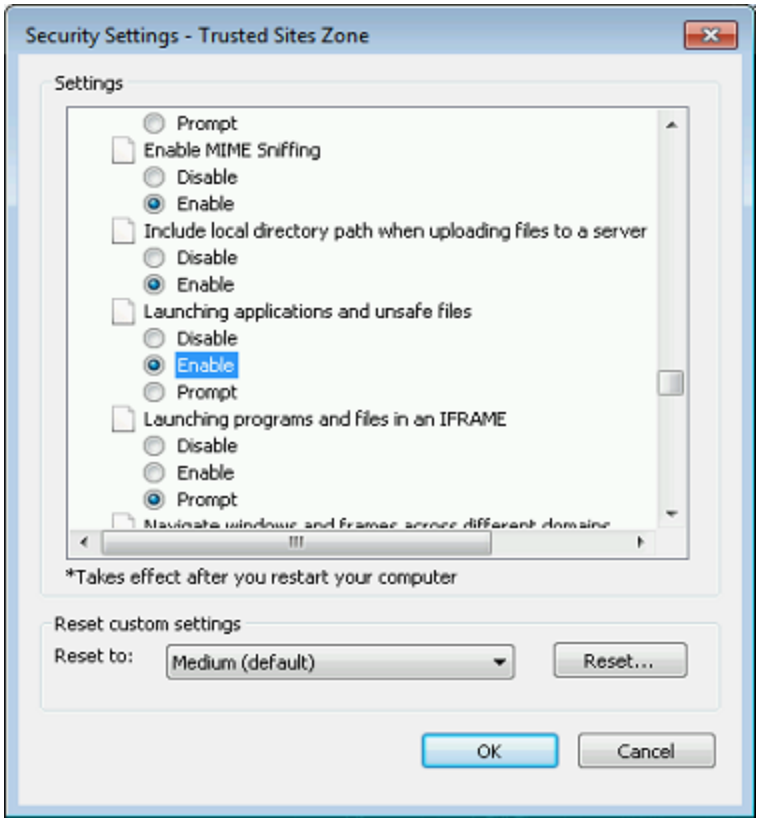
The WebDAV protocol is based on http and therefore the Internet Security zones applies to WorkZone Explorer. To ensure the best user experience and optimal performance, the WorkZone Explorer host name must be configured correctly in the Internet Security Zones.

1. In Internet Explorer, click **Tools** > **Internet options** > **Security** tab.
2. Add `http(s)://webdavhost` to either the **Trusted sites** zone or the **Local intranet** zone.

   The **Local intranet** zone must be selected to have automatic integrated user authentication performed by Windows without **Log on** dialog boxes.
3. Add `file://webdavhost` to the **Trusted sites** zone.

   If the file protocol is added to the **Local intranet** zone, searching using the search

connectors perform slowly when showing the results. In some cases, you might receive a security warning when opening a document folder location from a search result or when moving documents from the **Recycle Bin** to the **Restore** drop point. If you want to avoid these security prompts make sure that **Launching applications and unsafe files** is allowed for the **Trusted Sites** zone.



Advanced features and troubleshooting

It is possible to make permanent links to any document or case in the archive. It is available through a hidden folder called ".archive". All you need to know is the DNS, the ID, the document extension, and then you can open any document using this http address:

```
http://[WebDAVHostHeader]/[DSN]/.archive/WhateverYouWant (D[RecordKey]).
[Extension].
```

This mechanism can also be used to generate permanent links to any document.

You can also show cases through the .archive folder using:

```
http://[WebDAVHostHeader]/[DSN]/.archive/WhatEverYouWant (C[FileKey])
```

VIEW ERROR MESSAGES FROM THE SCANJOUR SYSTEM

Sometimes Windows Explorer does not show user friendly and descriptive error messages from the WebDAV server in case of errors or illegal operations. See FAQ.

If you want to see the real error from the ScanJour system, you can use Fiddler on the client to see the actual response and error from the server.

FAQs

This section contains a list of frequently asked questions on WorkZone Explorer functionality. Click any question below to see the answer.

Why unclear error messages?

Sometimes Windows Explorer does not show user friendly and descriptive error messages from the WebDAV server. When you perform an illegal operation, for example, try to move an archived document to another case, you only see a general error message such as: *Cannot read from source or disk*. Some of the Windows error messages that you might run into are explained in the FAQ items below.

Why do I get an error message when I try to add a document to the **Drafts** folder

You can only create new documents in folders that represent specific cases. You cannot create a new document directly in the **Drafts** folder, because the ScanJour system requires a case for placing the document correctly in the system. If you to try add a document to the **Drafts** folder, you get the following Windows messages depending on where you try to add it from:

A device attached to the system is not functioning.

- or -

Can't read from the source file or disk.

Why do I get an error message when I try to create a new case folder?

WorkZone Explorer is not configured to allow creation of new cases. Case creation must be enabled on the SJ-TEMP class in the file class system. You apply this configuration using WorkZone Configuration Management. If you try to create a new case, you get the following Windows message:

Unable to create the folder 'New folder' - File system error

Why do I get an error message when I try to create a new case folder in the **Cases currently placed with me** folder?

You cannot create new cases in this folder. You can create new cases in the **Open cases**, **Unclassified cases** folders, and in specific case folders. If you try to create a new case folder in a folder, which does not allow case creation, you get the following Windows error message:

Unable to create the folder 'New folder' - File system error

Why do I get an error message when I try to move a document from one folder to another?

You are probably trying to:

- Move a document from one standard list to another.
- Move a document from a case folder to a standard list, for example to the **Open cases** folder.
- Move a document to a closed case.
- Move a document that is archived or closed.

This is not possible. In these cases, you get the following Windows error message:

Can't read from the source file or disc.

Why are folders not deleted when they seem to be?

It is not possible to delete folders using WorkZone Explorer although it may look so in Windows Explorer. If you try to delete an empty folder, it looks as if the folder was successfully deleted but if you press F5 to refresh, the folder reappears. If you try to delete a folder with content, nothing happens after you have confirmed the deletion. Windows Explorer does not display any error message in this case.

Why do I get a strange error message when I try to rename a document?

There are several renaming scenarios where you might get this Windows error message:
Can't read from the source file or disk
For example, if you try to:

- Change the document ID (DXXX) in the document name. It is not possible to change the ID, only the document name can be changed.
- Rename a document, which is saved on a closed case. This is not possible.
- Rename a document in Windows Explorer but the document is opened in WorkZone Client or Captia Web Client.

Why are documents not shown in Windows Explorer after moving?

When moving documents between folders in Windows Explorer, Windows Explorer might get confused by the ScanJour mechanism that allows the same document to be exposed in multiple folders, and moving a document to the **Restore** drop point actually moves the document somewhere else. It seems that Windows Explorer caches the information on the document location and refuses to open it from somewhere else even if it is shown in the new location after refreshing. Try again a bit later and this issue is resolved.

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